



## DUTY STATEMENT

### STAFF SERVICES MANAGER I

#### OUR VISION

All Californians living in homes they can afford

#### OUR MISSION

Investing in diverse communities with financing programs that help more Californians have a place to call home

#### EMPLOYEE INFORMATION

Employee Name		Effective Date	
Classification <b>Staff Services Manager I</b>		Position Number <b>693-001-4800-901</b>	
Division/Section/Unit <b>Office of General Counsel</b>		Location <b>Sacramento, CA</b>	
CBID <b>S01</b>	Work Week Group <b>E</b>	Tenure <b>Permanent</b>	Time Base <b>Full-Time</b>
Immediate Supervisor		Supervisor Classification <b>Assistant Chief Counsel</b>	

#### POSITION DESIGNATED CONFLICT OF INTEREST

This position is designated under the Conflict-of-Interest Code. The position is responsible for making or participating in making governmental decisions that may potentially have a material effect on personal financial interests. The appointee is required to complete Form 700 within 30 days of the appointment. Failure to comply with the Conflict-of-Interest Code requirements may void the appointment.

#### CONDUCT, ATTENDANCE, AND PERFORMANCE EXPECTATIONS

This position requires the incumbent to communicate effectively orally and in writing in dealing with the public and/or other employees; develop and maintain knowledge and skills related to the position's specific tasks, methodologies, materials, tools, and equipment; complete assignments in a timely and efficient manner; and adhere to the Agency's policies and procedures regarding attendance, leave, and conduct. Must maintain regular and consistent attendance at such level as is determined at the Agency's sole discretion. Must be regularly available and willing to work the hours the Agency determines are necessary or desirable to meet its business needs.

#### **2 CCR § 172 – General Qualifications, states in pertinent part:**

The incumbent is expected to possess the general qualifications of integrity, honesty, sobriety, dependability, industry, thoroughness, accuracy, good judgment, initiative, resourcefulness, courtesy, ability to work cooperatively with others, willingness and ability to assume responsibilities and to conform to the conditions of work characteristic of the employment, and a state of health, consistent with the ability to perform the assigned duties of the class.

#### DIVISION DESCRIPTION

The Office of General Counsel (OGC) represents the California Housing Finance Agency (CalHFA) in connection with any legal issues affecting the Agency, including but not limited to administrative, legislative, finance, contracting, litigation, regulatory compliance, and transactional work. The OGC additionally provides legal advice to Agency management and the Board of Directors. The OGC is comprised of two main units: Multifamily and Single Family. The OGC staff assigned to support the Multifamily Program Division assist in structuring, drafting, and closing loans, provide support in developing programs, and assist the Asset Management Unit in connection with compliance issues with state and federal programs, multifamily projects, workouts, and foreclosures. The OGC staff assigned to support the Single Family Division assist in structuring and updating lending programs and the negotiation of agreements with loan originators, servicers, purchasers, and insurers. All OGC provides support on more generally applicable legal issues.

#### POSITION DESCRIPTION

Under direction of the Assistant Chief Counsel and guidance of Attorneys, the Staff Services Manager I (SSM I) provides expertise in Multifamily Lending Programs and transactions, and manages, directs, and supervises the support staff in the Division. This is a working level supervisor and primary responsibility is to ensure timely and accurate work is produced by staff. The duties and responsibilities also include, but are not limited to the following:

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PERCENTAGE OF TIME	ESSENTIAL FUNCTIONS
70%	<p><b><u>Multifamily Lending Programs</u></b> Acts as a lead to OGC personnel staff and works independently and in conjunction with all OGC staff, outside counsel, borrowers, borrower's counsel, title and escrow companies, and financial institutions to perform transactional real estate finance work associated with the Agency's lending programs.</p> <p><b>Loan Document Preparation:</b> Prepares and reviews loan documents (loan agreements, deeds of trust, regulatory agreements, subordination agreements, promissory notes, requests for notice of default, Uniform Commercial Code (UCC) Financing Statement, deposit account control agreements, etc.), terms sheets, board materials, senior loan write-ups, and other informative material in the project loan file to ensure accurate terms are reflected in the loan documents, all required documents are drafted, exhibits assembled, or forms completed consistent with the structure of the deal. Performs post-closing audits to identify and correct issues, if necessary.</p> <p><b>Title Report Evaluation:</b> Works with tile and escrow professionals to review preliminary title reports, surveys, and underlying title documents and drafts pro-forma policies of title insurance. Ensures compliance with county recording requirements before submitting loan documents to escrow.</p> <p><b>Asset Management Support:</b> Participates in internal and external meetings, reviews and drafts documents for OGC's Asset Management duties related to Transfers of Physical Assets, prepayments, payoffs, subordinations, loan modifications, workouts, including the review of preliminary title reports, organizational documents, tracking and renewal of UCC filings, and working with Asset Management and Fiscal Services Division staff to collect necessary documentation.</p> <p><b>Oversight of Tax Equity and Fiscal Responsibility Act of 1982 (TEFRA) Process:</b> Oversees staff in working with Multifamily Programs, Financing Division, and Bond Counsel to prepare publication notices for TEFRA hearings by identifying appropriate jurisdictions and manner of publication in compliance with federal and state laws. Oversees and ensures TEFRA hearings are conducted which solicit public comment on proposed multifamily financing for projects and that a record reflecting information presented during said hearings in compliance with Internal Revenue Service regulations is created.</p> <p><b>Training and Development:</b> Trains Legal Analysts, Staff Services Analysts, Associate Governmental Program Analysts and other OGC staff in the entire loan closing and Asset Management processes, which includes document management software, MF database, setting-up loan files, proofreading documents, closing procedures and practices, recording requests, and audits.</p> <p><b>Template Documents Management:</b> Monitors document templates for necessary changes and updates and coordinates with support staff to ensure that correct modifications have been made to all appropriate boilerplate documents.</p> <p><b>General Research Support:</b> Provides analytical support to professional legal staff by researching electronic databases maintained by governmental entities (e.g., Secretary of State, County) and commercial vendors. Identifies deficiencies and prepares correspondence advising borrowers and other interested parties of the deficiencies and follows-up ensuring compliance with Agency's conditions for securing its financing of the project.</p> <p><b>Electronic Database Management:</b> Responsible for ongoing administration of electronic database software and reporting problems identified to Information Technology (IT) personnel and other departmental point persons. Coordinates with IT and providers to develop and implement training for OGC. Responsible for maintaining multifamily project and OGC files (electronic and paper files). Oversees support staff's preparation of paper files for scanning into database and temporary personnel</p>

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25%	<p>tasked with indexing and profiling scanned materials.</p> <p><b>Administration and Management</b> Provides oversight and guidance in the implementation of program support needs by planning, leading, organizing, mentoring, and directing staff. Develops and implements annual goals and objectives for the staff, measures and evaluates achievements, and leads by example. Distributes workload, tracks due dates, monitors and evaluates performance, verifies and approves attendance and leave requests, provides training, and implements progressive discipline when necessary. Develops training and work plans, sets performance and customer service standards for staff; and develops justifications for needed staffing changes. Participates in recruiting, interviewing, and hiring processes while adhering to best hiring practices. Attends and conducts meetings with staff and performs related supervisory and backup duties as needed.</p> <p><b>Quality Assurance:</b> Monitors, analyzes, and evaluates the quality, quantity, and effectiveness of operations, and develops, recommends, and implements policies, procedures, and improvements to provide high quality, timely, and efficient support for the OGC and its Agency clients. Collaborates with management staff to share best practices on customer services and promote consistent delivery of support functions. Tracks, identifies, and ensures completion of projects and process improvement initiatives. Assists in the compilation and submission of external reporting requirements including the design, implementation, communication, monitoring, and modification of internal control systems.</p>	
PERCENTAGE OF TIME		MARGINAL FUNCTIONS
5%	Participates in staff meetings, attends training, provides work status reports, handles special projects, and performs other duties as required within the scope of the assigned classification.	
PERSONAL CONTACTS		
<ul style="list-style-type: none"> <li>Daily contact with the public, all levels of departmental staff, and representatives from other State and county agencies.</li> </ul>		
SPECIAL REQUIREMENTS		
<ul style="list-style-type: none"> <li>N/A</li> </ul>		
WORK ENVIRONMENT		
<ul style="list-style-type: none"> <li>Prolonged sitting</li> <li>Work in a high-rise building</li> <li>Use a computer keyboard and read from computer screens several hours a day</li> </ul>		
PHYSICAL ABILITIES		
<ul style="list-style-type: none"> <li>Be able to lift and carry up to 20 lbs.</li> </ul>		
TRAVEL		
<ul style="list-style-type: none"> <li>Occasional travel may be required within and/or outside the state of California via private or public transportation (i.e., automobile, airplane, etc.)</li> <li>Travel may include overnight stay.</li> </ul>		
EMPLOYEE ACKNOWLEDGEMENT		
<p>I have read and understand the duties listed above and I certify that I possess essential personal qualifications including integrity, initiative, dependability, good judgment, and ability to work cooperatively with others; and a state of health consistent with the ability to perform the assigned duties as described above with or without reasonable accommodation. (If a reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with Human Resources.)</p>		
Employee Name	Employee Signature	Date
SUPERVISOR ACKNOWLEDGEMENT		
<p>I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee with a copy of this duty statement.</p>		

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Supervisor Name	Supervisor Signature	Date